

## Item 1 - Cover Page

### **Diane Goldman**

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July 2025

This brochure supplement provides information about Diane Goldman that supplements the TLG Advisors, Inc. Brochure. You should have received a copy of that brochure. Please contact TLG Advisors, Inc. if you did not receive TLGA's brochure or if you have any questions about the contents of this supplement.

Additional information about Diane Goldman is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 – Educational Background and Business Experience

Ms. Goldman was born in 1960. She attended Franklin & Marshall College from 1978 until 1980. She received her BS in Economics from University of Pennsylvania (Wharton School). From 2006 until 2021 she was an Insurance Agent at New Agency Partners then Hilb Group. In 2021 she started Creative Financial Services. In 2025 she joined TLG Advisors, Inc. as an Investment Advisor Representative.

### **Item 3 - Disciplinary Information**

Registered investment advisers are required to disclose all relevant facts about any legal or disciplinary issues that you need to know about before deciding to invest your money with them. Ms. Goldman has no such issues on her record.

### **Item 4 - Other Business Activities**

Ms. Goldman is also the owner of Creative Financial Services where she sells other fixed insurance products and offers Retirement Income Planning: Annuities, Life, Long Term Care.

### **Item 5 - Additional Compensation**

Ms. Goldman provides investment-planning advice to her customers on a fee basis. In addition, she may receive compensation from the activities detailed in Item 4 above.

### **Item 6 - Supervision**

We supervise our investment advisor representatives in the following ways:

- Compare activity in your account with your investment objectives;
- Ensure that your financial information and investment objectives have been recorded;
- Confirm that you are contacted annually to find out if there are any changes in your financial information or investment objectives;
- Verify that you receive quarterly statements;
- Make sure your advisory fees are being charged correctly;
- Ensure that we comply with your wishes concerning directed brokerage arrangements;
- Check to see if you are invested in securities that don't match your risk tolerance.

Advisory representatives are supervised by Jane Riley, TLG Advisors, Inc. Chief Compliance Officer. She may be reached at 888-371-0013, or [compliance@tlgadvisors.net](mailto:compliance@tlgadvisors.net).